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DEPARTMENT OF AGRICULTURE

Foreign CROPS AND MARKETS

VOLUME 60 NUMBER 5

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FOR RELEASE

MONDAY

JANUARY 30, 1950

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UNITED STATES DEPARTMENT OF AGRICULTURE
OFFICE OF FOREIGN AGRICULTURAL RELATIONS
WASHINGTON 25, D.C.

LATE NEWS

The Deputy Chief Controller of Imports at Bombay has issued import licenses for 85,000 bales (500 pounds gross) of United States cotton for shipment prior to March 31, 1950. The Indian Government has allocated foreign exchange to buy from abroad a total of 1,000,000 bales during the year ending August 31, 1950. India's 1949-50 cotton crop is not expected to supply more than two-thirds of the country's needs.

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Final estimates of Italy's 1949 flaxseed, hempseed, and cottonseed (commercial) crops were reported at 221,250 bushels, 3,460 short tons, and 3,230 short tons, respectively. Corresponding figures for 1948 were 472,140, 2,700, and 4,400.

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FOREIGN CROPS AND MARKETS

Published weekly to inform producers, processors, distributors and consumers of farm products of current developments abroad in the crop and livestock industries, foreign trends in prices and consumption of farm products, and world agricultural trade. Circulation of this periodical is free to those needing the information it contains in farming, business and professional operations. Issued by the Office of Foreign Agricultural Relations of the U.S. Department of Agriculture, Washington 25, D.C.

WORLD COTTON CROP ESTIMATE REVISED UPWARD

World cotton production is now estimated by the Office of Foreign Agricultural Relations at 30,850,000 bales (of 500 pounds gross), compared with an estimate of 30,400,000 bales on October 24, 1949. The Office's latest estimate for the United States crop is higher by 588,000 bales than that released last October, while its foreign production estimates were revised downward by a total of 138,000 bales. The present world estimate represents an increase of 6 percent over last year's revised figure of 29,155,000 bales but is still below the 5-year prewar average by nearly 3 percent.

Production in the United States has risen sharply since the end of the war. The 1949 crop of 16,034,000 bales is the sixth largest crop on record and 22 percent above the 1935-39 average. Foreign production as a whole has been rising slowly since the end of the war but still is 20 percent below the prewar average.

The principal factors limiting expansion of cotton acreage abroad are the continued scarcity and high prices available locally for food crops, coupled with government restrictions on cotton acreage in India, Egypt, and several smaller producing countries to assure more adequate production of food commodities. Civil war in China and shortages of farm labor in many cotton-growing countries, particularly in South America and parts of Africa, are also important as factors limiting expansion of foreign cotton production. Mexico apparently is not affected by any of these factors, as production has doubled since 1946.

Unusually favorable weather in Mexico together with an acreage increase of nearly 300,000 acres has resulted in a 1949 crop of about 900,000 bales or 58 percent above the previous record crop of 570,000 bales reported in 1948. Nearly all of Mexico's cotton cultivation is done under irrigation. The opening of new irrigation systems in or near the principal cotton growing areas has facilitated the sharp expansion in cotton acreage since 1946. Devaluation of the peso on July 22, 1948 from the equivalent of 20.6 U. S. cents to 14.4 cents resulted in higher prices for cotton in terms of Mexican currency and provided a strong incentive for increasing production in 1949. A further stimulus to cotton production was the liquidation in 1947-48 of all surplus cotton stocks accumulated during the war period. A further increase in production may be expected in 1950 as a result of the favorable prices received in 1949 and the fact that practically all of the surplus from the 1949 crop already has been sold.

In the United States a crop of 16,034,000 bales (December 1 estimate) was produced on a harvested area of 26,898,000 acres representing an increase of 8 percent in production and 18 percent in acreage over the final estimates for 1948. Unusually favorable weather in Texas, California, Arizona, and New Mexico, caused production in those States to reach 50 percent of the total crop in 1949, compared with an average of 31 percent

COTTON: Acreage and production in specified areas, averages 1935-39 and 1940-44, annual 1947-49 1/

Continent and country	Acreage					Production 2/				
	Year beginning August 1					Year beginning August 1				
	Averages					Averages				
	1935-39	1940-44	1947	1948 3/	1949 3/	1935-39	1940-44	1947	1948 3/	1949 3/
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 bales	1,000 bales	1,000 bales	1,000 bales	1,000 bales
NORTH AMERICA										
El Salvador	9	23	38	32	36	5	12	22	22	21
Guatemala	-	7	7	8	8	2	3	5	5	5
Mexico	725	855	927	1,050	1,334	334	425	484	570	900
Nicaragua	9	7	-	8	35	5	5	-	6	20
United States	27,788	21,992	21,269	22,821	26,898	13,149	11,957	11,857	14,877	16,034
British West Indies	20	20	9	12	-	5	5	3	5	-
Haiti	-	-	40	40	40	22	12	11	13	-
Puerto Rico	2	8	-	-	-	1	2	4/	4/	4/
Total 5/	28,642	22,960	22,299	23,975	28,367	13,523	12,421	12,386	15,498	16,998
EUROPE										
Bulgaria	85	61	105	-	-	35	17	28	-	-
Greece	168	101	105	112	142	76	27	53	55	72
Italy	56	106	45	38	42	21	27	15	12	13
Rumania 6/	8	63	109	-	-	2	11	16	-	-
Spain	46	96	108	131	142	10	17	13	29	15
Yugoslavia	8	17	-	-	-	3	5	-	-	-
Total 5/	372	445	499	592	662	147	104	135	160	170
U.S.S.R. (Europe and Asia)	5,087	3,911	3,625	4,100	4,550	3,430	2,080	2,400	2,600	2,700
ASIA										
Cyprus	11	6	-	5	6	3	1	1	1	1
Iran	453	384	205	259	272	171	105	80	92	78
Iraq	53	73	21	25	-	11	10	3	2	3
Syria	85	48	48	54	69	28	15	25	28	-
Turkey	667	736	502	734	875	249	241	218	308	375
Afghanistan	-	-	-	-	-	49	23	-	20	30
Burma	428	364	192	190	170	97	80	35	35	30
China (including Manchuria)	7,038	5,849	6,400	6,300	5,600	2,855	2,012	2,136	2,115	1,700
French Indochina	36	-	-	-	-	6	7	3	-	-
Japan	2	-	7	7	12	1	1	5	2	3
India	1/ 24,204	1/ 20,518	10,932	11,055	12,000	1/ 5,348	1/ 4,853	2,510	1,960	2,325
Korea	564	776	355	282	343	198	196	64	72	113
Indonesia	27	24	-	-	-	9	10	-	-	-
Pakistan	1/	1/	3,122	2,715	-	1/	1/	925	826	900
Philippine Islands	5	15	-	2	3	1	3	4/	4/	1
Siam	16	35	87	70	-	7	11	27	27	-
Total 5/	33,805	29,056	21,961	21,828	22,307	9,038	7,575	6,048	5,494	5,628

SOUTH AMERICA										
Argentina	770	826	815 8/	1,236 8/	1,300	289	398	423	446	450
Brazil	5,562	5,812	4,800	4,700	5,200	1,956	2,169	1,260	1,540	1,700
Colombia	98	99	-	-	-	23	22	25	28	40
Ecuador	40	38	-	-	-	13	9	10	12	9
Paraguay	111	116	74	131	-	40	42	33	50	50
Peru	428	353	321	358	-	384	310	282	285	285
Venezuela	50	53	-	-	-	11	15	10	11	9
Total 5/	7,060	7,299	6,217	6,642	7,222	2,716	2,965	2,043	2,372	2,543
AFRICA AND OCEANIA										
Anglo-Egyptian Sudan	439	363	363	402	341	248	253	215	256	240
Belgian Congo	874	923	754	741	-	172	182	184	220	-
Kenya	-	-	28	43	-	13	21	4	8	-
Nyasaland	84	56	-	-	-	12	7	11	-	-
Tanganyika	-	-	-	-	-	50	45	42	38	36
Uganda	1,477	1,152	1,037	1,555	1,629	281	198	141	317	260
Egypt	1,821	1,162	1,302	1,496	1,754	1,893	1,243	1,314	1,836	1,691
French Equatorial Africa	390	583	-	-	-	41	87	108	110	-
French Morocco	1	5	-	2	2	4/	2	-	1	1
French West Africa	-	-	-	-	-	28	20	14	23	35
Mozambique	-	497	-	634	- 9/	33	93	101	119	-
Nigeria	-	-	-	-	-	36	30	35	60	60
Angola	73	-	-	-	-	13	24	24	20	28
Southern Rhodesia	2	5	4	-	-	4/	1	1	-	-
Union of South Africa	-	-	-	8	-	2	1	2	6	-
Australia	53	35	7	2	-	11	7	2	1	-
Total 5/	6,176	5,641	5,299	6,263	6,632	2,840	2,220	2,203	3,031	2,811
World total 5/	81,142	69,312	59,900	63,400	69,740	31,694	27,365	25,215	29,155	30,850

1/ United States production in bales of 500 pounds gross weight (480 pounds net); others in bales of 478 pounds net through 1945; and 480 pounds thereafter. 2/ Years shown refer to years of harvest. 3/ Preliminary. 4/ Less than 500. 5/ Includes estimates for minor producing countries not listed above and allowances for other figures not available. 6/ Figures for 1943 to date are not comparable with prewar figures because of boundary changes. 7/ Included with India. 8/ Planted area. 9/ Exports.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics, reports of United States Foreign Service officers and results of office research.

for 1938-47. Excessive rain and heavy boll weevil damage in other parts of the Cotton Belt resulted in lower than average yields and relatively poor quality of the crop. Yield per acre for the country as a whole, however, averaged 285.8 pounds in 1949 against 312.6 pounds in 1948 and a 1938-47 average of 254.0 pounds.

In a referendum held December 15, 1949, United States cotton farmers voted nearly 90 percent in favor of acreage restrictions for the 1950 crop following an official declaration that cotton was in surplus supply. The Secretary of Agriculture has set an acreage allotment of 21.0 million acres for 1950, representing a reduction of 30 percent from the 27,359,000 acres planted in 1949. A bill has been introduced in Congress, however, to modify or adjust allotments for 1950 on the ground that undue hardship is imposed on farmers in some areas. This bill, if enacted, would permit an upward adjustment of about 1.3 million acres in the total to be planted.

A 1949-50 crop of 20,000 bales in Nicaragua is more than 3 times the size of the 1948-49 crop of 6,000 bales and compares with a prewar and wartime average of only 5,000 bales. The local mill industry requires only 6,000 bales annually which leaves a surplus for export of about 14,000 bales from the 1949-50 crop. No appreciable change in production is reported from other countries of Central America and the Caribbean area.

Production in the countries of Southern Europe totaled about 170,000 bales compared with 160,000 in 1948-49. A poor crop of 15,000 bales in Spain was more than offset by increases in Greece and Yugoslavia.

Press reports from the Soviet Union indicate that weather in the cotton areas was not favorable in 1949 and yields per acre may have been down by 5 or 6 percent, with production up by approximately 100,000 bales because of an increase in acreage. A production estimate based on fragmentary data is calculated by the Office of Foreign Agricultural Relations at about 2,700,000 bales, or 100,000 higher than in 1948. Acreage in 1949, also calculated, is placed at 4,550,000 acres compared with an estimated figure of 4,100,000 acres for 1948.

Reports from Turkey indicate a record 1949 crop of at least 375,000 bales, representing an increase of 65,000 to 70,000 bales above the 1948 estimate of 308,000 bales. Export demand for Turkish cotton is strong since price supports were abandoned by the government in 1948 and several trade agreements involving sale of cotton have been concluded with European countries.

The collection of cotton acreage and production data for the 1949 crop in China has been extremely difficult under civil war conditions. Sources in China, however, have estimated the 1949 crop at about 1,700,000 bales from 5.6 million acres, compared with 2,115,000 bales from 6.3 million acres in 1948. Such a crop is inadequate to meet the needs of mill and home industries, estimated in 1948-49 at about 3.0

million bales. Imports of cotton will receive a high priority if and when the ports are reopened, because of the importance of the cotton mill industry as a stabilizing factor in the nation's economy. At the same time the new government will make every effort to raise production to meet domestic needs for cotton.

Production in India, estimated at about 2,325,000 bales in 1949-50, is nearly 19 percent higher than in 1948-49, resulting from a 10 percent increase in acreage and some improvement in yields per acre over the very poor yields of 1948-49. Growing conditions in Bombay Province, except the Oomras tracts, have been favorable this year. In the Oomras tracts, including the Central Provinces, Berar, and Khandesh, production is expected to be 10 to 15 percent below earlier estimates but well above production last year. In Madras Province the prolonged drought may reduce present estimates of cotton production in that area.

No appreciable increase in cotton acreage in India is expected in the next few years because of restrictions imposed by the government to encourage food production. Various forms of subsidies also are paid for acreage and fertilizers used for cultivation of food crops. Prices available for food crops are generally higher than those for cotton.

The 1949-50 cotton crop in India is about 1 million bales below total requirements of mills and home industries. Quotas announced by the government for 1949-50 permit the export of only 165,000 bales of Bengal and Dhollera type (Asiatic short-staple varieties) cotton normally produced in surplus quantities.

In Pakistan, the 1949-50 crop estimated at 900,000 bales is slightly higher than the 826,000 reported last year and is based entirely on some improvement in growing conditions. Acreage is reported to be about the same as the 2,715,000 acres reported in 1948-49. Nearly 90 percent of the 1948-49 crop was composed of American varieties with approximately three-fourths of the Pakistan cotton crop under irrigation.

The 1949-50 crop of 113,000 bales in Korea is 57 percent above last year's small crop of 72,000 but is still little more than half of the prewar average of 198,000 bales. Pressure for greater postwar production of food crops has prevented any appreciable increase in cotton production, although the crop is roughly 50,000 bales less than the quantities needed to operate the mills and the important home industry in 1949-50.

The Argentine cotton crop, estimated unofficially at around 450,000 bales for 1949-50, is about equal to that of 1948-49. Official statistics have not been released for more than a year but private sources indicate that acreage also is equal to or slightly higher than 1,235,000 acres planted in 1948-49. Production in the past 3 years has averaged little more than mill requirements, leaving only small surpluses for export. Mill requirements in 1949-50 may reach 400,000 bales, leaving only 50,000 bales available for export.

Picking of the 1949-50 crop in South Brazil will not begin until late February or March so production estimates are still preliminary. Distribution of seed for planting is up by about 20 percent but early drought may have necessitated a considerable amount of replanting. An increase of 500,000 acres to 5,200,000 in 1949-50 is calculated from incomplete data for Brazil as a whole with a preliminary production estimate of 1,700,000 bales. Last year's production estimate was revised to 1,540,000 bales. The 1949-50 estimate consists of 450,000 bales for North Brazil, roughly 100,000 for minor states in South Brazil and 1,150,000 for Sao Paulo.

The relatively low production reported during all the previous postwar years is attributed to unfavorable weather conditions, some shift to cultivation of food crops, shortage of farm labor and depletion of soil with little use of fertilizers. Brazilian cotton production is not expected to regain its record levels of 2.5 to 2.7 million bales as long as farm labor is scarce and high-profit coffee growing competes with cotton for available land, labor, and capital in Sao Paulo.

Picking of the 1949-50 crop in Peru will begin in commercial volume in April with unofficial production estimates at least as high as last year's crop of 285,000 bales. Acreage is believed to be a little higher than last year's 358,000 acres. Growing conditions were favorable as late as mid-January, except for a shortage of water for irrigation early in the growing season. Changes in foreign exchange regulations have, in effect, increased prices of cotton in terms of Peruvian currency but were effected too late (November 1949) to have much influence on the 1949-50 crop, most of which was planted during September to November. The stimulus provided by these changes may be reflected in increased acreages in 1950-51. The 1948-49 crop of Pima amounted to about 45,000 bales and is expected to be at least as large in 1950-51.

The 1948-49 crop of 50,000 bales in Paraguay was much smaller than anticipated earlier as a result of heavy damage done by a newly discovered aphis-like fly called Garagaphia torresi. Early reports indicate a probable 1949-50 crop of about the same size. New infestation by this fly is expected but efforts to combat it with insecticides are being planned by the government. All of the crop except about 5,000 bales consumed locally is usually available for export.

Egypt's 1949-50 crop is estimated at 1,691,000 equivalent bales of 500 pounds (2nd official estimate) or 8 percent less than last year's crop of 1,836,000 bales. The prewar average is 1,893,000 bales. The 1,754,000 acres reported in 1949 are 258,000 acres or 17 percent greater than in 1948. The sharp drop in yields in 1949 is attributed to severe damage to cotton plants in the northern delta area by leafworm and boll worm. The infestation was limited almost entirely to the 6 provinces growing extra long-staple cotton.

Production of extra- and medium-long-staple varieties in 1949-50 is estimated at 859,000 bales (including 518,000 of Karnak), compared with 720,000 bales a year ago. Production of the ordinary long staple, mostly Ashmouni, amounted to 802,000 bales compared with 1,086,000 a year ago. About 30,000 bales of scarto (unclassified cotton) were reported each year. Acreage restrictions announced on November 27, 1949, for the 1950-51 crop will limit cultivation of extra- and medium-long-staple varieties to about 725,000 acres, a reduction of 250,000 acres from the 1949 acreage planted to these varieties. This acreage is expected to yield not more than 760,000 bales, which is a rough estimate of probable world demand for these varieties in 1950-51. Cultivation of the shorter varieties is not restricted as demand for them is expected to rise as a result of currency devaluation and dollar scarcity in most of the cotton importing countries.

Cotton acreage in Uganda, estimated at 1,629,000 acres for 1949-50, is 74,000 higher than that of a year ago but production estimated at 260,000 bales is lower by 57,000 bales. Unusually high yields were obtained in 1948-49 under favorable weather conditions while 1949-50 yields were out sharply by drought.

In the Anglo-Egyptian Sudan the 1949-50 crop is estimated at 240,000 bales, a decline of 16,000 bales due to dry weather and lower acreage.

In the Belgian Congo, French Equatorial Africa, Mozambique, and Nigeria, little change is expected from last year's total production of about 510,000 bales. Production in French West Africa is expected to reach 35,000 bales, an increase of 12,000 over that in 1948-49. In Angola, an increase of 8,000 above the 1948-49 crop of 20,000 bales is expected this year.

This is one of a series of regularly scheduled reports on world agricultural production approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of A. W. Palmer, Charles H. Barber, Paul E. Quintus, and Guy L. Bush.

BROAD AND HORSE BEAN PRODUCTION IN 1949-50 BELOW PREWAR

Production of broad and horse beans in 25 of the more important producing countries of the world is estimated at 84 million bags in the 1949-50 season. This is 8 percent below the 91 million bags produced last year and 17 percent below the estimated average prewar production of about 101 million bags in these same countries.

Europe: The greatest reduction was rpported in Europe where the 1949 production was only 12 million bags or 47 percent below the average prewar production of 23 million bags and 10 percent below the 1948 production of 14 million bags. The sharp decline from prewar is common to

BEANS, broad and horse: Acreage, yield and production in specified countries, averages 1935-39 and 1940-44, annual 1948 and 1949 1/

Continent and country	Acreage				Yield 2/				Production			
	Average				Average				Average			
	1935-39	1940-44	1948	1949 3/	1935-39	1940-44	1948	1949 3/	1935-39	1940-44	1948	1949 3/
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Pounds	Pounds	Pounds	Pounds	1,000 bags	1,000 bags	1,000 bags	1,000 bags
THE AMERICAS												
Bolivia	10	11	11	10	1,307	1,182	1,200	1,300	128	130	132	130
Chile	2	2	3	3	1,239	981	667	667	25	24	20	20
Ecuador	25	25	27	30	244	240	259	250	61	60	70	75
Guatemala	2	3	4	4	1,448	800	625	625	24	24	25	25
Mexico	70	90	96	95	444	446	459	463	311	401	441	440
Total	109	131	141	142	504	488	488	486	549	639	688	690
EUROPE												
Belgium	23	8	7	11	2,230	1,849	1,900	2,055	513	146	133	226
Cyprus	6	6	7	7	1,046	1,000	792	714	67	60	53	50
Czechoslovakia	7	6	4	5	1,400	1,000	1,525	1,427	98	60	61	71
France	147	80	97	104	1,166	856	953	785	1,714	685	924	816
Greece	58	60	67	55	817	667	631	702	474	400	423	386
Italy	1,584	1,300	1,293	1,305	837	577	566	443	13,256	7,500	7,320	5,783
Netherlands	28	20	11	12	2,329	1,630	1,555	2,267	652	326	171	272
Portugal	136	147	128	125	649	547	661	394	883	804	846	492
Spain	454	357	350	360	722	662	657	667	3,279	2,364	2,300	2,400
United Kingdom	123	209	88	109	1,767	1,621	1,782	1,706	2,173	3,387	1,568	1,859
Total	2,566	2,193	2,052	2,093	901	717	672	590	23,109	15,732	13,799	12,355
ASIA												
China	6,931	6,935	7,353	7,099	960	947	914	852	66,535	65,675	67,224	60,502
Iraq	20	25	4	4	2,620	2,820	3,086	3,084	524	705	116	133
Japan	80	46	42	42	1,280	1,341	814	1,050	1,024	617	342	441
Lebanon	4	4	4	4	425	500	914	952	17	20	35	35
Syria	10	13	48	80	1,200	1,008	967	1,100	120	131	464	880
Turkey	173	130	116	115	730	679	722	496	1,263	883	838	570
Total	7,218	7,153	7,567	7,344	963	951	912	852	69,483	68,031	69,019	62,561
AFRICA												
Algeria	75	68	46	50	475	300	443	450	356	204	204	225
Egypt	408	400	413	440	1,598	1,630	1,533	1,607	6,521	6,521	6,330	7,069
French Morocco	150	194	84	90	365	434	423	284	548	842	355	256
Tunisia	71	83	85	85	758	425	412	412	538	353	350	350
Total	704	745	628	665	1,131	1,063	1,153	1,188	7,963	7,920	7,239	7,900
World total	10,597	10,222	10,388	10,244	954	903	874	815	101,104	92,322	90,745	83,506

1/ May include some green harvest particularly in the countries reporting high yields per acre. 2/ In cases of small acreages, yields are based on unrounded estimates of acreage. 3/ Preliminary.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research and other information. Years refer to year of harvest in the Northern Hemisphere and include the harvest immediately following in the Southern Hemisphere. Averages are for years stated or for the nearest comparable period.

every reporting country in Europe. Not all of these countries, however, are below their level of 1948. Several countries report a considerable increase over their low outturn of last year.

Acreage in Europe has not declined nearly as much as production, the 1949 acreage dropping to 18 percent less than prewar and production, 47 percent. Average yields in Europe in 1949 were estimated at 590 pounds per acre as compared to 901 pounds prewar. Some of this decline in yield may be due to a larger than usual proportion of the crop being picked green; leaving a smaller proportion to be picked dry on the same acreage. This may have been stimulated to some extent by theshort supply of other pulses in Europe in recent years. A very large part of the broad bean crop is normally picked green and used as a green vegetable for food. (See last paragraph of this summary.)

Asia: Production in Asia is estimated in 1949 at 63 million bags, of which 61 million bags were reported from China. China reports by far the largest production of broad beans of any country in the world. The 1949 production of 61 million bags in China is about 10 percent less than the 66 to 67 million bags produced in 1948, the average produced in the war years 1940-1944, and in the prewar years 1935-1939. The situation in China is not typical of the other reporting countries of Asia. In fact, Syria and Lebanon report very marked increases of production since prewar. However, the total volume in these other countries is insignificant as compared to China. Turkey, Japan and Iraq each produced from 500,000 to 1 million bags in prewar years. They report very marked declines in 1949. The current situation in these countries is similar to that in European countries where production has declined about 50 percent or more from prewar.

The Americas: In the Western Hemisphere production in 1949-50 is estimated at 690,000 bags or about the same as last year, and 26 percent above prewar. Of the total production in The Americas in 1949, 440,000 bags or 63 percent of the total were produced in Mexico. Nearly all of the increase indicated for The Americas was in Mexico. In that country, acreage, yield and production have all increased since prewar. Comparatively small quantities of broad beans are produced in the United States, mostly in New York and California. Most of this output is consumed locally by people of foreign extraction.

Africa: In Africa, the most important producing country is Egypt. That country accounted for 89 percent of the total African production reported in 1949. Egyptian production of 7 million bags in 1949 represents only a slight increase from the average production in each of the two periods 1935-39 and 1940-44. It is 12 percent more than last year. Production in Africa as a whole reflects a similar trend; although some individual countries, for example, French Morocco and Tunisia, indicate fairly marked declines in recent years from much higher prewar levels.

Description

The color of broad beans varies in many shades of green, tan, brown, and red. They are irregular in shape and differ greatly in size. The largest broad beans may exceed in size the largest of lima beans. They are used both in the green and dry form. In Western Europe and the Mediterranean area they are a winter grown crop, being among the earliest green vegetables to become available in the spring. The beans are picked green and eaten sometimes without cooking. The bulk of the production is consumed green. But the figures herein pertain for the most part to the dry production.

The terms broad and horse beans seem to be used loosely the world over. Some countries report production of each kind separately, while other countries in the same general area report both kinds in one figure or only one kind to the exclusion of the other even when both kinds apparently are produced in the country. Generally, the term horse bean designates a smaller and thicker bean than the broad bean. There appears to be many varieties of horse beans frequently known by other names such as pigeon beans, sheep beans and feed beans. Likely much of the horse bean production known by these colloguial names is not included in this summary.

A large share of the broad bean production and nearly all of the horse beans are used for livestock feed or for soil improvement. Italy has reported that as much as two-thirds of the broad bean crop is used frequently for livestock feed. A considerable part of this may be the smaller or horse bean type. Many of the beans used for feed may be harvested green. But the green portion of the crop should not and likely does not appear in this summary. The proportion used for feed varies from year to year and from country to country with the relative scarcity and prices of beans and competing products.

COMMODITY DEVELOPMENTS

TOBACCO

RECORD TOBACCO CROP FORECAST FOR SOUTHERN AFRICA

As a result of higher acreages and favorable weather conditions in some growing districts the 1949-50 tobacco crop in the Southern African countries of Southern Rhodesia, Northern Rhodesia, Nyasaland and the Union of South Africa is unofficially forecast at 14 percent above the 1948-49 harvest, according to the American Embassy in Pretoria. If the 1949-50 forecast materializes it will be the largest tobacco crop ever produced in southern Africa. However, the effects of weather and other growing conditions during the remainder of the season may result in a considerable change in the present forecast.

The 1949-50 production of leaf tobacco in the countries indicated above is unofficially forecast at 177.5 million pounds, compared with 155.1 million in 1948-49 and 162 million in 1947-48. Southern Rhodesia's 1949-50 crop is forecast at 92 million pounds, or 52 percent of the total for the four countries. A total of 48 million pounds is indicated for the Union of South Africa, 30 million for Nyasaland and 7.5 million for Northern Rhodesia.

The 1949-50 production of flue-cured leaf is forecast at 122.5 million pounds, or 69 percent of the total. This compares with 71 percent in 1948-49 and 64 percent in 1947-48. Flue-cured production in Southern Rhodesia is placed at 90 million pounds, or about 98 percent of the 1949-50 total. This type is expected to account for about 47 percent of the total in the Union of South Africa, 10 percent in Nyasaland and 93 percent in Northern Rhodesia. In addition to flue-cured, about 30 million pounds of light and dark air-cured leaf, 23 million pounds of fire-cured and 2 million pounds of Turkish are included in the 1949-50 forecast for Southern Africa.

SOUTHERN AFRICA: Tobacco production in Southern Rhodesia, Northern Rhodesia, Nyasaland, and the Union of South Africa, 1949-50 forecast, with comparisons

Types of Leaf	Southern Rhodesia	Northern Rhodesia	Nyasaland	Union of South Africa	Total
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Flue-cured					
1949-50 1/	90.0	7.0	3.0	22.5	122.5
1948-49	81.5	5.7	2.9	20.3	110.4
1947-48	75.4	4.3	2.7	22.0	104.4
Other types					
1949-50 1/	2.0	0.5	27.0	25.5	55.0
1948-49	1.1	0.2	22.3	21.1	44.7
1947-48	2.5	0.8	26.7	27.6	57.6
Totals					
1949-50 1/	92.0	7.5	30.0	48.0	177.5
1948-49	82.6	5.9	25.2	41.4	155.1
1947-48	77.9	5.1	29.4	49.6	162.0

1/ Unofficial forecast.

Compiled from official and U. S. Foreign Service Reports.

TROPICAL PRODUCTS

NICARAGUA EXPECTS RECORD COFFEE HARVEST

The forecast of Nicaragua's 1949-50 exportable coffee production has been revised upward to 315,000 bags from an earlier forecast of 265,000 bags, according to the American Embassy in Managua. This would exceed the previous record of 309,000 bags for export from the 1934-35 harvest. The 1948-49 crop was the poorest since 1912, providing only 110,000 bags for export as compared with an annual average prewar, 1935-39, exportable production of 253,000 bags.

Of the anticipated 315,000 bags for export from the 1949-50 harvest, it is estimated that about 60 percent will come from the Managua-Carazo area, where the coffee known to the trade as "Nicaragua Washed" coffee is produced. The remaining 40 percent is expected to come from the northern coffee-producing districts, the coffee from which is classified as "Matagalpa Washed."

Coffee is the most important industry and largest single source of dollar exchange in Nicaragua. The bumper 1949-50 coffee crop, about half of which has already been harvested, will greatly benefit the coffee planters, who are in a bad financial condition because of last year's very short crop. It will also assist materially in correcting the chronic imbalance of international payments from which Nicaragua has suffered in recent years. Although about half of the 1949-50 crop was sold in advance at prices prevailing before the sharp increases in October and November, it is estimated that Nicaragua will receive around 14 million dollars from the sale of this crop, compared with about 4 million dollars from the unusually small 1948-49 harvest.

LIVESTOCK AND ANIMAL PRODUCTS

NORWAY'S LIVESTOCK NUMBERS, EXCEPT HORSES, RISE [1]

Preliminary data based on Norway's June 30, 1949 agricultural census indicate that all species of livestock except horses have increased and are now larger than those of 1948. The general increase was most pronounced in hog numbers. Although restoration of livestock numbers received a severe setback by the unprecedented drought of 1947, practically all species except horses are making notable progress. The increase generally reflects the good crops of 1948.

Cattle numbers, according to preliminary data, were 4 percent larger in June 1949 than a year earlier, but almost 16 percent below 1939. The decline from prewar was the largest in the bull and young animal classes, with milk cows showing a lesser decrease. The 1950 Government goals call for some expansion in cattle numbers. Such expansion of the industry, however, will be dependent on prices of dairy products, and availability of domestically-produced and imported feed supplies.

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[1] Based on report from Dr. Einar Jensen, Agricultural Attache, American Embassy, Oslo.

Hog numbers in June 1949 showed an increase of 66 percent over June 1948 and now exceed the 1939 level. Highly favorable relationships between prices of pork and feeds, the good crops in 1948 and the increased allocation of feed grains were the principal factors contributing to the sizable expansion in 1949. Further expansion of the industry is desired by the Government and present numbers are slightly below the proposed goal.

Although horse numbers declined about 2 percent, there appears to be a better distribution between age groups and horse labor is regarded as more efficient than 10 years ago. Further decline in numbers, as well as increased efficiency, is anticipated. However, the terrain of much of Norway is not conducive to a large degree of mechanization and a relatively large number of horses will continue to be needed in the joint agricultural and forestry operations.

Sheep numbers showed some increase over a year earlier and are now almost 4 percent larger than those of 1939 and the highest since 1918. The increase is attributed to the rise in prices of mutton and lamb and partially to the Government allocation of feed to sheep producers in exact proportion to their sales of mutton and breeding animals. During the last 10 years, sheep farming area has shifted and sheep numbers have decreased on the western coast of Norway, where such farming is dependent on mountain grazing, and numbers in the better agricultural districts are increasing.

Chicken numbers now exceed those of 1939. The 1949 numbers increased about 36 percent over those of 1948. Poultry development in the various sections of the country differ considerably. Numbers in the more predominating poultry counties of prewar appear to have decreased since 1939. Government goals call for an additional increase of 8 percent for 1952.

NORWAY: Number of livestock on June 20, 1949, with comparisons

Classification	1939 1/	1946	1947	1948	1949 1/ prelim.
	1,000 head	1,000 head	1,000 head	1,000 head	1,000 head
Cattle	1,455	1,267	1,225	1,175	1,222
Hogs	362	257	259	248	412
Sheep	1,744	1,707	1,698	1,629	1,808
Goats	249	178	155	145	162
Horses	204	238	225	206	200
Chickens	3,422	1,433	2,047	2,725	3,700

1/ Agricultural Census.

Compiled from official sources.

ARGENTINE CURRENT POULTRY SITUATION

The Argentine poultry and egg situation is generally characterized by stable production at higher costs, larger domestic consumption at higher prices and sharply reduced exports. Even though poultry and eggs were removed from Argentine Trade Promotions Institute 1/ control in the latter part of 1949, and increased preferential exchange was granted, local prices are not attractive to foreign buyers.

The indigenous production of eggs last year is estimated at about equal to that of 1948. An increase in the quantities domestically consumed, however, made it necessary to import 20,000 cases of shell eggs from the Netherlands and Belgium for the last winter season (April-July). Egg production in 1950 is not expected to change significantly but large stocks of shell eggs in frigorificos is expected to cover production deficits.

Exports of shell eggs during 1949 were seriously curtailed due to the domestic shortage. Two separate export quotas of 50,000 cases each were granted during the year, but only 51,200 cases were shipped. Switzerland and Italy took 39,700 and 11,500 respectively. Exports in previous years normally amounted to 200,000 cases. Shipments to Switzerland were at a price of 48 cents per dozen as based upon the exchange rate effective October 1949, which was more favorable for trade. Exports of dried eggs during 1949 were 485 tons.

The 1949 production of chickens and hens is estimated at approximately 10 percent greater than the previous year, and the domestic consumption probably amounted to 20 million birds. Since there has never been a poultry census in Argentina, the forecasts can only be on a percentage basis. There were no exportations of chickens and hens in 1949.

Chickens for market in 1950 are expected to be about the same as 1949 although they may be marketed somewhat earlier than usual due to current strong prices for poultry, increased production costs, coupled with a shortage of corn in important chicken raising zones.

Dressed chickens for export are being quoted at 53 cents per pound f.o.b. Buenos Aires. Currently there is little if any foreign interest in poultry meat.

The anticipated increase in the turkey crop failed to materialize. Thus production was about equal to the preceding year. Turkey producers who normally depend considerably on export market, were in a weak position since the United Kingdom did not enter the market in 1949 and exports amounted to only 285 tons. The limited export market was partially offset by the increasing popularity of turkey meat in Argentina.

1/ I.A.P.I. Commission was 20 percent on the f.o.b. price for export chickens and 7.5 percent for turkeys.

LUXEMBOURG POULTRY SITUATION

Luxembourg produced about 40 million eggs in 1949, or about the same number as before the war. Chicken numbers, however, are estimated at 400,000 which is only about 77 percent of prewar. The rise in output per hen is attributed to improved stock and more extensive use of breeds emphasizing egg production.

Imports of eggs totaled only approximately 12 million eggs in 1949 since it was difficult to obtain imports at prices as low as the official Luxembourg ceiling price. Imports of about 400 metric tons of poultry were made in 1949.

The 1950 production of eggs is expected to be about the same as 1949 while imports of 14 million eggs are anticipated. These goals should provide a per capita consumption comparable to prewar.

Egg prices in Luxembourg are currently fixed at 72 cents per dozen.

FATS AND OILS

BURMA'S PLAN FOR SELF-SUFFICIENCY IN EDIBLE OILS DISRUPTED

Burma's plan for self-sufficiency in edible oils has been disrupted by postwar economic and political dislocations, spreading insurrection, and some unfavorable weather conditions.

Sesame and peanut crops, Burma's two principal vegetable oilseeds, not only are far below prewar production levels, but are now being obtained in smaller quantities than during 1947.

The 1948 sesame crop of 45,800 short tons was almost 6 percent less than it had been the year before due to reduced plantings. A still smaller outturn, estimated at 36,300 tons, was harvested in 1949. Semi-drought conditions, immediately after the sowing season, reduced the yield per acre. Likewise, the 1948 peanut crop of 161,300 tons was approximately 6 percent less than the previous year's harvest. The decrease was attributed principally to reduced planting and adverse weather conditions. The 1949 outturn probably did not exceed 143,400 tons since the planted area was expected to be 9 percent less than it had been in the previous year, and the yield per acre was believed reduced by irregular distribution of rains. Only negligible quantities of other oilseeds, including rape and mustard, flaxseed, and coconuts, are produced in Burma.

The production of oilseeds, like every other phase of the Burmese economy, has suffered from general disturbances and lack of transportation facilities. Not only have actual plantings been hampered but programs for crop and acreage improvement, agricultural research and education, and governmental advisory services have been curtailed because of fund shortages and necessary diversion of attention and activity to other services.

The same is discernible in the case of vegetable oils. Officials estimate that vegetable oil production is slightly more than half the prewar volume. Production during 1948-49 probably did not exceed 28,000 tons of peanut oil and 11,000 tons of sesame oil compared with the prewar averages of 45,000 and 22,000, respectively.

Although reduced oil production is principally attributable to a smaller seed crop, the failure to restore Burma's war-destroyed oil producing equipment has been an important contributing factor. The crushing industry is not expected to make any more progress during 1949-50 than it has thus far since the war. Crop prospects indicate less seed available for crushing, and it is improbable that more efficient crushing equipment will be installed in the immediate future.

Imports of vegetable oilseeds have virtually ceased since the war, and the volume of vegetable oil imports has been lower than that of prewar. The import trade has been hampered by lack of internal transportation, reduced mill capacity, and primitive equipment of the bulk of the crushing industry. Imports will likely increase in 1950, however, since local production is expected to be inadequate for domestic needs. Moreover, the transportation situation is expected to improve and adequate supplies are available from India.

Since the war, cottonseed has been the principal oilseed exported from Burma. Peanuts and sesame, which in prewar years were important export items, are no longer included in Burma's foreign shipments. Vegetable oil exports have dwindled also.

Reduced oilseed and oil supplies and heavy consumer demand have combined to raise the postwar prices far above prewar levels. No appreciable change from 1948-49 is anticipated in the 1949-50 price level.

URUGUAY ANTICIPATES SMALLER SUNFLOWER, PEANUT CROPS

Uruguay anticipates smaller sunflower seed and peanut crops in 1950 than in 1949. The best commercial estimate places the sunflower seed harvest at 44,000 short tons and the peanut outturn at 9,900. Official estimates for 1949 were 66,520 and 11,500 tons, respectively. The supply of sunflower and peanut oils from previous crops is adequate to meet the needs of domestic consumption.

NORWAY TO EXPORT SIZEABLE QUANTITY OF FATS AND OILS TO SWEDEN

Norway will export to Sweden in 1950 over 15,000 short tons of marine oils and stearine waste. Provision for this sale, in addition to many other items, was made in the Norwegian-Swedish trade agreement signed in Oslo on December 14, 1949. Exports from Norway will include 4,400 tons of raw whale oil; 4,400 tons of hardened whale oil; 1,650 tons of industrial fish oil; 1,980 tons of veterinary cod liver oil; 330 tons of medicinal cod liver oil; 385 tons of canning oil; and 2,200 tons of stearine waste. Sweden's exports to Norway will include only a small quantity, 55 tons, of rapeseed oil.

NORWEGIAN WHALING OPERATIONS INCLUDE INNOVATIONS

The Norwegians are seeking to strengthen their competitive position in the production of whale oil by using greater portions of the whale than heretofore. According to a report by the Norwegian Ministry of Commerce, submitted to the Economic Cooperation Administration, several of the floating whaling factories operating in the Antarctic this season have been equipped to process in addition to vitamin-rich liver oil the raw material from the pancreas gland for the production of insulin.

Perhaps the most important innovation in the Norwegian Antarctic whaling operations this season, however, is the production of canned whale meat aboard the tanker "Kosmos V." The report states the automatic factory constructed on board this ship has a capacity for processing a considerable quantity of canned meat a season. Norway, whose 205,000 short tons of whale and sperm oil in the 1948-49 season comprised about 45 percent of the world's output, leads all other countries in the production of these two marine oils.

WHALING MAY BE RE-ESTABLISHED AT ELLY BAY, IRELAND

The whaling industry may be reinstituted soon at Elly Bay, Ireland--near Belmullet, County Mayo. A group of Norwegian and Irish businessmen, early in December 1949, published notice of their intention to apply for a license permitting them to establish and operate at Elly Bay a whale-processing industry under the Whale Fisheries Act of 1937. Two months will have to elapse after the publication of this notice before formal application for the license is made. The Ministry of Industry and Commerce may then grant a license, if he considers it advisable to do so, but only after a public inquiry has been held to permit objectors to appear and present their evidence. Comments in the press on the proposal to establish the industry again at Elly Bay have been favorable.

A whale-processing industry was established at Elly Bay shortly after the turn of the century. The factory was destroyed by fire in 1923, however, and the company, which had operated 5 whaling boats and employed 30 people in its factory, ceased to operate.

FRUITS, VEGETABLES AND NUTS

PINEAPPLE PRODUCTION IN FOUR IMPORTANT PRODUCING AREAS SUMMARIZED

Brazil: Production of pineapples in Brazil for 1949, estimated at 70.8 million fruits, is about the same as was produced in 1948, and is 9 percent below the 1942-45 average of 77.6 million. The major producing state in Brazil is Sao Paulo which produced 15.6 million fruits in 1948. The other two important producing states, Pernambuco and Paraiba, had crops of 12.8 and 10.8 million fruits respectively.

Brazilian pineapple production is centered in the area along the northeast coast where the first commercial plantings were made over a century ago. This area has been handicapped by lack of adequate transportation and the fact that the seasonal harvest occurs in November and December tends to glut the local market. This year the crop in Paraiba, the largest on record, was not a boon to growers but forced prices down to one cent per fruit.

Exports during 1948 amounted to 118,000 crates, of which 116,000 crates went to Argentina. The 1950 crop, as estimated by trade sources, may be larger than the 1949 crop.

Cuba: Cuban 1949 pineapple production is now estimated at 277 million pounds, 27 percent smaller than the 1948 crop of 382 million but 78 percent larger than the prewar average of 156 million. Around 124 million pounds of the 1949 crop was processed into 880,000 cases of canned pineapples, 35 million pounds into barrels of pineapple in brine, 64 million were exported fresh and an estimated 45 million used for domestic consumption. Production in 1950 is likely to be smaller than in 1949. Demand in the United States is declining and growers are replanting less than in recent years.

Mexico: Pineapple production for 1950 in Mexico is estimated at 4.4 million crates (70 pounds) as compared with 3.1 million for 1948 and 1.7 million for the 5-year average 1940-44. The most important increase is expected in the Isla region of Veracruz, which will be the leading pineapple region during the coming season. Growing conditions have been favorable thus far and harvest is expected to start by the end of April or the beginning of May. The total capacity of the pineapple-processing plants at present is estimated to be half of the indicated production but the amount packed will depend on prevailing prices for export and for canning.

Australia: Pineapple production in Australia is confined chiefly to the State of Queensland where about 98.6 percent (1.7 million cases) of Australia's total crop was produced in 1948. The 1949 crop in Queensland is estimated at 1,696,000 cases, a little less than the 1948 crop of 1,736,000, the largest on record. The 1949 summer crop, because of dry weather conditions in 1948, was somewhat lower than the 1948 crop; however, the winter crop was heavy and above that of the previous year. Prospects for the 1950 pineapple crop are good, plantings being extensive in all areas in 1949. Normally about half the pineapple crop is used in canneries and the remainder sold in Queensland and interstate fresh fruit markets.

GRAINS, GRAIN PRODUCTS AND FEEDS

CUBAN RICE IMPORT QUOTA FILLED

The Cuban Government on January 23 announced that the current rice import quota was filled on January 20 and that all later imports this quota year are "subject to increased tariff duties which said quota and decrees which regulate it have established." The quota year is June 10, 1949, to July 1, 1950, and the quota was established in November at 451 million pounds (see Foreign Crops and Markets, January 23, 1950). Cuban customs officials state that rice from all countries signatory to the General Agreement on Tariffs and Trade is now subject to a duty of $3.70 per 100 kilograms ($1.80 per 100 pounds).

VENEZUELA PLANS RICE PRODUCTION INCREASE

The Venezuelan Development Corporation has made a public announcement that it will invest $5,400,000 this year in the expansion of rice production, according to the American Embassy, Caracas. Last year's investment was $1,500,000. The Corporation states it will follow the same plan used last year and that the annual rice deficit will be balanced much sooner than has been believed.

The expanded acreage will be in the States of Cojedes and Portuguesa where the major effort of 1949 was centered. However, it is known the Corporation plans rice credits for the State of Lara in the Barquisimeto region. At the present time two new drying and storage plants are planned for Portuguesa and one for Lara.

Concerning the 1950 plans of the Corporation, it is possible that the proposed investment may add at least the amount of annual rice imports (around 30 million pounds) to the Venezuelan production. This is provided the climatic season is favorable, and that the machinery, fertilizers, seed, insecticides and herbicides are available at the right time.

COTTON AND OTHER FIBER

COTTON-PRICE QUOTATIONS ON WORLD MARKETS

The following table shows certain cotton-price quotations on foreign markets converted at current rates of exchange.

COTTON: Spot prices in certain foreign markets, and the U.S. gulf-port average

Market location, kind, and quality	Date 1950	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
Alexandria		Kantar			
Ashmouni, Good	1-26	99.05 lbs.	Tallari	76.90	44.58
Ashmouni, F.G.F	"	"	"	74.40	43.13
Karnak, Good	"	"	"	83.65	48.49
Karnak, F.G.F	"	"	"	76.65	44.43
Bombay		Candy			
Jarila, Fine	"	784 lbs.	Rupee	1/ 620.00	16.50
Broach Vijay, Fine	"	"	"	1/ 690.00	18.37
Karachi		Maund			
4F Punjab, S.G., Fine	1-25	82.28 lbs.	"	75.00	27.50
289F Sind, S.G., Fine	"	"	"	78.00	28.60
289F Punjab, S.G., Fine	"	"	"	81.00	29.70
Buenos Aires		Metric ton			
Type B	1-26	2204.6 lbs.	Peso	1/ 4000.00	37.55
Lima		Sp. quintal			
Tanguis, Type 5	1-25	101.4 lbs	Sol	(not	quoted)
Pima, Type 1	"	"	"	415.00	28.11
Recife		Arroba			
Mata, Type 4	1-26	33.07 lbs.	Cruzeiro	175.00	28.79
Sertao, Type 5	"	"	"	(not	available)
Sao Paulo					
Sao Paulo, Type 5	"	"	"	182.00	29.94
Torreon		Sp. quintal			
Middling, 15/16"	"	101.4 lbs.	Peso	218.00	24.88
Houston-Galveston-New Orleans av. Mid. 15/16"	"	Pound	Cent	XXXXX	31.17

Quotations of foreign markets reported by cable from U.S. Foreign Service posts abroad. U.S. quotations from designated spot markets.

1/ Nominal.